



## The Gift Planning Council of New Jersey

P.O. Box 579, Moorestown, NJ 08057

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[www.giftplanning-nj.org](http://www.giftplanning-nj.org)

### GPCNJ February Program

**Date:** Monday, February 22, 2010

**Time:** 10:30 a.m. – 11:30 a.m. Nuts & Bolts Session  
11:30 a.m. – 12:00 p.m. Networking  
12:00 a.m. – 2:00 p.m. Luncheon Program

**Fee:** Nuts & Bolts Session: FREE For GPCNJ Members, \$10 for Non-Members  
Luncheon Program: \$35 for GPCNJ Members, \$45 for Non-Members

**Where:** Doubletree Hotel Princeton  
4355 Route 1  
Princeton, NJ 08540

#### **Nuts & Bolts Session (10:30 a.m. – 11:30 a.m.) – FREE for GPCNJ Members, \$10 for Non-Members**

##### **“Making the Right Choice Between a Gift Annuity and a Charitable Remainder Trust” Presented by: Frank Minton**

Clearly, a gift annuity is preferable in some situations and a CRT in others. However, the choice between the two is sometimes complicated by the bias that planned giving professionals may have for gift annuities, and the bias that estate and financial planning professionals may have for CRTs. With a better understanding of the applications of these two instruments and an appreciation of the perspective of other professionals, both groups can work collaboratively on what works best for the donor.

This session will discuss situations when one or the other instrument would be more beneficial to the donor and charity and offer suggestions for navigating the differences that may arise between professionals.

#### **Luncheon Session (12:00 p.m. – 2:00 p.m.) - \$35 for GPCNJ Members, \$45 for Non-Members**

##### **“Letting Go” Presented by: Frank Minton**

Gift planners regularly deal with donors who find it difficult to surrender control of property, donors who have to let go of positions of influence at work and in the community, and donors who may be confronting their own mortality. It is not enough to present compelling financial illustrations and strong case statements to such individuals. It is also important to understand their emotions and help them find meaning in the process of letting go.

#### **About the Speaker – Frank Minton**

Frank Minton is a thoroughly accomplished planned giving expert. Frank founded Planned Giving Services, a consulting firm that built an exceptional national reputation and was acquired by PG Calc in August 2005.

Before entering consulting in January 1991, he spent ten and one-half years with the University of Washington, where he served as Director of Planned Giving and Executive Director of Development. Previously he served as Senior Estate Planning Officer and Field Director at Northwestern University, and was for six years a professor at Muskingum College in Ohio. He received M.A. and Ph.D. degrees from the University of Chicago.

Dr. Minton has played a most critical role in shaping the planned giving industry as we know it today. He has served both as conference chair and President of the National Committee on Planned Giving, a nationwide organization of gift planning professionals. In 1992 he received its Distinguished Service Award. He is an extensively recognized expert on gift annuities and has served as Chair of the American Council on Gift Annuities. He has also received a CASE (Council for the Advancement and Support of Education) Distinguished Service Award, the David Donaldson Distinguished Service Award from the Planned Giving Group of New England, and was the first recipient of the Outstanding Development Officer Award from the Northwest Development Officers Association.

*Deadline for registrations is February 18, 2010. No-shows will be billed. No refunds after February 18, 2010.*



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## **REGISTRATION FORM**

*February 22, 2010*

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Organization: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Special Dietary/Disability Needs: \_\_\_\_\_

### Membership Status:

I am a GPCNJ Member

I am not a GPCNJ Member     Please add me to your mailing list.

### I plan to attend:

Nuts & Bolts Only (10:30 a.m. – 11:30 a.m.) – FREE for GPCNJ Members, \$10 for Non-Members

Luncheon Only (12:00 p.m. – 2:00 p.m.) – \$35 for GPCNJ Members, \$45 for Non-Members

Both the Nuts & Bolts & Luncheon Program – \$35 for GPCNJ Members, \$55 for Non-Members

### **Payment Information:**

I prefer to pay with a check (Please make checks payable to GPCNJ).

Please charge \$\_\_\_\_\_ to my credit card: (check one)     Visa     MasterCard

Credit Card Number: \_\_\_\_\_ Exp. Date: \_\_\_\_\_

Card Holders Name: \_\_\_\_\_ CCID#: \_\_\_\_\_

Card Address: \_\_\_\_\_

Card City: \_\_\_\_\_ Card State: \_\_\_\_\_ Card Zip: \_\_\_\_\_

Signature: \_\_\_\_\_

### **Please return your registration form and payment to:**

**GPCNJ Office**

**P.O. Box 579**

**Moorestown, NJ 08057**

**Fax: 856-727-9504**

**Email: [Denise.Downing@comcast.net](mailto:Denise.Downing@comcast.net)**

*Registrations by fax, mail or email are preferred. Please no phone calls.*